HVAC Maintenance Checklist

Preventive maintenance and service visit record for split units, package units, AHUs, FCUs and similar equipment. Tick each task, note anything that needs attention, and record readings on page 2.

Customer	Work order no.
Site / location	Date
Technician	Time in / time out
Make and model	Serial no. / asset ID

Equipment type ☐ Split ☐ Package ☐ AHU ☐ FCU ☐ VRF ☐ Other

Visit type ☐ PPM ☐ Breakdown ☐ Inspection ☐ Installation check

1 Safety and preparation

Task	OK	Attention	N/A	Notes
Review previous service history and open issues	☐	☐	☐	
Isolate power and apply lockout / tagout	☐	☐	☐	
Wear the required PPE for the task	☐	☐	☐	
Check access, working area and any site permit	☐	☐	☐	

2 Indoor unit (AHU, FCU, split indoor)

Task	OK	Attention	N/A	Notes
Inspect air filter; clean or replace	☐	☐	☐	
Inspect evaporator coil for dirt, ice or damage	☐	☐	☐	
Check blower wheel, fan motor and belt (where fitted)	☐	☐	☐	
Check drain pan and condensate line; flush if needed	☐	☐	☐	
Check airflow at supply grilles	☐	☐	☐	
Inspect insulation and duct connections at the unit	☐	☐	☐	

3 Outdoor unit and condenser

Task	OK	Attention	N/A	Notes
Clean condenser coil	☐	☐	☐	
Check condenser fan, blades and motor	☐	☐	☐	
Inspect cabinet, mounting and anti-vibration pads	☐	☐	☐	
Clear debris and check clearance around the unit	☐	☐	☐	
Listen for unusual noise or vibration	☐	☐	☐	

In hot, dusty climates, filters and condenser coils usually need checking more often than the standard schedule.

4 Refrigerant system

Task	OK	Attention	N/A	Notes
Check for signs of leaks (oil stains, frosting)	☐	☐	☐	
Inspect refrigerant lines and insulation	☐	☐	☐	
Check sight glass (where fitted)	☐	☐	☐	
Record operating pressures in the readings table	☐	☐	☐	

5 Electrical and controls

Task	OK	Attention	N/A	Notes
Inspect wiring and terminals; tighten loose connections	☐	☐	☐	
Check capacitors and contactors	☐	☐	☐	
Look for signs of overheating or burnt insulation	☐	☐	☐	
Test thermostat or controller and set points	☐	☐	☐	
Check sensors and safety switches	☐	☐	☐	

6 Readings

Reading	Unit	Before	After
Outdoor ambient temperature	°C / °F		
Return air temperature	°C / °F		
Supply air temperature	°C / °F		
Temperature difference (return minus supply)	°C / °F		
Suction pressure	psi / bar		
Discharge pressure	psi / bar		
Supply voltage	V		
Compressor current	A		
Fan motor current	A		
Capacitor (rated / measured)	µF		

Compare readings with the manufacturer's specifications for this unit and refrigerant.

7 Final checks

Task	OK	Attention	N/A	Notes
Restore power and run the system	☐	☐	☐	
Confirm cooling or heating performance	☐	☐	☐	
Clean the work area	☐	☐	☐	
Explain findings to the customer	☐	☐	☐	

Parts and materials used	Qty	Notes

Findings and recommendations

Priority	☐ Urgent	☐ Next visit	☐ Monitor

Photos taken	☐ Before	☐ After	☐ Defects	☐ None

Technician name	Customer name
Technician signature	Customer signature

General maintenance frequency guide

Frequency	Typical checks
Monthly	Filters, thermostat, airflow and visible condition of the equipment
Quarterly	Coils, drainage, electrical connections and controls
Every six months	Deeper component inspection and system performance checks
Annually	Full inspection, cleaning, testing and a review of the service history

Intervals depend on the equipment, operating hours and site conditions. The manufacturer's schedule takes priority.

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